YOUR ROLE

BUSiNESS FUNDiNG ADViSER	
Salary Group	Externally Authorised Adviser
Why your role is important	Making it easier for businesses to find and use the best funding and finance is part of our core purpose. Business Funding Advisers help our customers identify and secure the most suitable finance and funding packages from both private and public sector.

MAiN RESPONSiBiLiTiES AND KPi'S

- Always uphold the ART of UMi in all that you do and ensure full adherence to expected behaviours and conduct
- When you see an opportunity to do so, use your skill, experience, and personal characteristics to support projects and activities outside of your core role.
- Be an advocate of UMi through active involvement in promotional and marketing activity and through broader networking and introductions.
- Uphold our commitment to people, planet and profit by consistently operating to UMi's policies, standards and ethics.
- Facilitate introductions and applications to funding providers, using your knowledge and experience to tailor packages to meet the customer's needs.
- Proactively contribute to the awareness of the Get Funding service and lead generation through networking and business development activities.
- Provide clear, comprehensive guidance to businesses on funding eligibility, application processes, and requirements.
- Maintain regular contact and manage relationships with customers and referral partners through all stages of the process, providing support to them as appropriate.
- Build and maintain relationships with intermediaries, partners, and relevant stakeholders to stay informed about new opportunities and changes in the funding landscape.
- Conduct full assessment on commercial finance applications using the Optimum ELITE portal ensuring compliance with FCA regulations and all internal company policies and procedures.
- Carry out due diligence on new clients in line with UMi's Anti-Money Laundering Policy.
- Comply with the FCA Code of Conduct Rules (COCON), together with all other applicable FCA regulatory requirements and processes relevant to your role and duties.

THE ART OF UMi

Our values and beliefs

- **Adventurous –** our adventures take us far and wide – they're tough and exciting but we are fearless and open-minded about where they might lead.
- **Responsible –** we share a collective responsibility to each other, respect the world we live in, and we keep our promises.

- **Togetherness -** We can achieve more together than we can apart, and we know that businesses are more than just bricks and mortar or numbers on a spreadsheet – they're powered by people.

YOUR ROLE WiTHiN UMi

- Team: Get Funding.
- Your Manager: Chief Funding Solutions Officer.
- Reports: N/A.

THE ESSENTiAL THiNGS YOU NEED

- Successfully complete the registration and fitness and propriety checks in accordance with FCA Credit Broking requirements.
- Proven experience in business funding, finance, or a related field.
- Excellent communication and interpersonal skills, with the ability to build strong relationships with clients and stakeholders.
- Strong sales acumen with the ability to negotiate and close deals that align with client needs and business objectives.
- Strong project management abilities and attention to detail.
- Ability to work independently while also collaborating within a team.

THE THiNGS THAT ARE NiCE TO HAVE

- In-depth knowledge of available funding options from both private and public sectors.
- Experience in credit broking or providing commercial finance.
- Understanding of financial principles to evaluate the viability of funding options and ensure they align with the business objectives.
- A strong and established business development network.

YOUR SiGNATURE	
MANAGER'S SiGNATURE	